

Jared Cales Launches Phileo Advisory Group in Jacksonville

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/EINPresswire.com/ -- [Phileo Advisory Group](#), an independent investment advisory firm, is pleased to announce the launch of its new office in Jacksonville, Fla. President [Jared Cales](#) saw an opportunity to provide an even greater value to those he serves and thus created Phileo Advisory Group.

The Phileo Advisory Group seamlessly works in concert with many elements that can impact financial plans. They take a proactive approach to finances and building wealth; collaborating with certified public accountants and estate planners to help individuals and business owners make educated financial decisions.



Jared Cales, President, Phileo Advisory Group

Prior to launching Phileo Advisory Group, Jared spent over six years as an independent financial adviser. A steward of financial education, his team's focus is on helping others build financial clarity and making informed decisions about their financial futures.

"With access to best-in-class technology and reconciliation tools we're able provide a higher level of service to those who already put their trust in us. We're focused on building a planning-centric organization that places the needs and best interest of our clients first at all times," says Cales.

The adoption of technology further empowers Phileo Advisory Group to help clients understand their financial position, plan, and outlook. Clients seeking personalized, sophisticated, and collaborative experiences can gain a panoramic view of their finances. Access to this technology is one of the many reasons Phileo Advisory Group chose [ChangePath](#) as their Registered Investment Advisory firm.

"We're pleased to have the Phileo Advisory Group among an elite class of boutique advisers across the U.S. Jared's leadership and client-centric philosophy are what many advisory firms aspire to achieve," says Marty Pfannenstiel, President, ChangePath.



About Phileo Advisory Group

The Phileo Advisory Group are independent financial advisers

approaching every client's finances as if they were their own. A consultative relationship should be more than just an adviser, it's a team effort. The care for clients and well-being are unmatched because we develop enjoyable, life-long relationships. The Phileo Advisory Group was founded by Jared Cales and located at 10151 Deerwood Park Blvd., Bldg. 200, STE 250 in Jacksonville, Florida, 32256. For more information contact the team at 904.868.9132 or visit www.phileoadvisory.com.



Ultimately, the opportunity to establish my own firm provides clients with a higher degree of service and brings them deeper value in all aspects of their financial life."

Jared Cales, President

About ChangePath

At ChangePath, we deliver technology-driven wealth management tools alongside high-touch consultation to create firm efficiencies for independent investment adviser representatives, sub-advisers and solicitors. ChangePath's vertically integrated wealth management services coupled with industry-leading marketing helps entrepreneurial

wealth managers navigate increasingly dynamic and complex needs. ChangePath is an SEC-Registered Investment Advisory firm that delivers an adviser-centric experience empowering financial firms across the U.S. For more information, visit: www.changepath.com.

Investment advisory services offered by duly registered individuals on behalf of ChangePath, LLC a Registered Investment Adviser. ChangePath, LLC and Phileo Advisory Group are unaffiliated entities.

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